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INTERNATIONAL DEMOGRAPHICS

CONSUMER ■ TRENDS ■ AND ■ MARKETS ■ ABROAD

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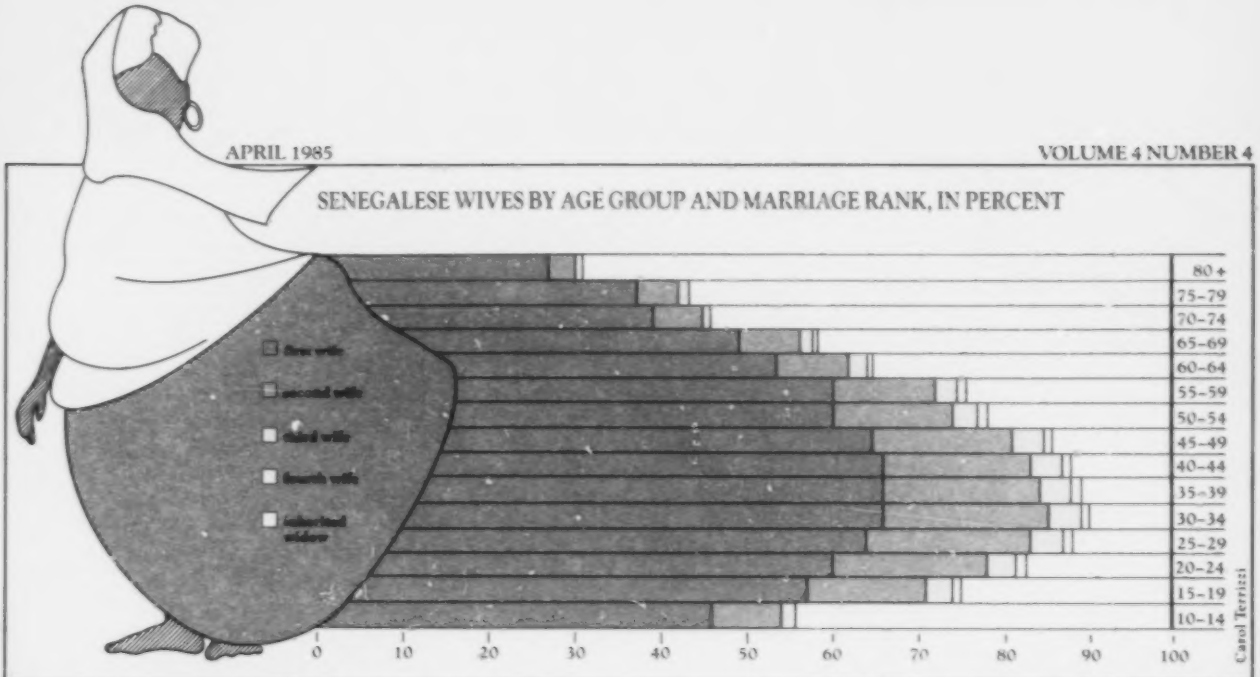

COUNTRY PROFILE

REPUBLIC OF SENEGAL

With slow, patient movements, you can trap the monkey in the bush.

A picture may be worth a thousand words, but in very few words this maxim captures the character of the nation that coined it: Senegal, West Africa. Translated from Senegal's most widely understood language, Wolof, it typifies the slow, relaxed pace of life in a country where time is not punched in, but lingered over.

Quickness is not so much valued as thoroughness; the result not so important as the process; and the human element in both business and pleasure is paramount. In the home, friends and family may spend several hours visiting over a meal or the ritual three cups of sugary tea; at the workplace or in the fields, a handshake and an extended conversation about family members' health precedes a business transaction or agricultural activities. Western visitors who do not allow time for such pleasantries with their hosts will find their best efforts to conduct business are in vain.

It is not surprising that patience is the hallmark of the Senegalese, whose very survival has been so governed by waiting.

Although Senegal's history as an empire dates back to the fourth century and as a political entity to 1920, it was not until 1960 that the nation gained independence from its primary colonizer, France.

As in many African countries, development of a viable infrastructure has been slow, meaning long delays in correspondence, communication, transportation, and the installation of amenities such as electricity and piped water, particularly in the rural areas.

Waiting for rain also has been a constant preoccupation among the Senegalese. A primarily rural country in which 70 percent of the population ekes out a living from agriculture, Senegal's economic well-being hinges on a harsh and capricious climate that has not been particularly cooperative with farmers in recent years.

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THIS MONTH: SENEGAL

Droughts that have plagued the Sahel in cyclical fashion for centuries have been unusually persistent in the last decade, with devastating effects on the nation's peanut harvest, the main source of foreign exchange, as well as on the sorghum, millet, and rice growth for local consumption. The "great drought" that struck in the early 1970s ravaged the land and wiped out thousands of humans and livestock. Though conditions began to improve in the latter part of the decade, sparse rains in the last few years have paralyzed agricultural production and crippled the economy. In 1984, the country suffered a 220,000-ton food deficit when farmers in some areas of the country harvested only 10 percent of their normal crop yields.

But even when rain is abundant, harvests of Senegal's staple crops are not plentiful enough to feed its people. In an average year, Senegal imports 360,000 tons of rice and up to 120,000 tons of wheat, most of what it consumes.

Like that of its Sahelian neighbors, Senegal's predicament is the result of both natural disaster and human miscalculation. The region's soil, already the world's oldest and weakest, bears the scars of years of overintensive cultivation and reduced fallow periods. As forests are stripped of their trees to supply wood for fodder and cooking fuel, the Sahara desert is advancing into fertile lands to the south, as much as four miles a year in some areas.

Still, the government has begun taking tough steps to institute reforms in crop pricing and marketing structure and the potential for progress is good. Senegal's president, Abdou Diouf, has been praised for having a more practical, no-nonsense approach to development than his predecessor, the intellectual statesman and poet Leopold Sedar Senghor.

Diouf has worked closely with the government and Western relief officials to chart long-term development strategies designed to improve the quality of life and reduce dependency on food imports and donations. In recent years, the government has encouraged foreign investment in the industrial sector, and phosphate mining, fishing, and textiles are some industries that have been expanding in the last decade.

Despite the poor economy, there is a demand in Senegal for Western goods, especially in urban areas, where Senegalese are fond of Western-style clothing, watches, audio and stereo equipment, and other specialty items.

With its magnificent coastline and warm, dry temperatures eight months out of the year, Senegal has long been a haven for French and other European tourists. But since the release of Alex Haley's *Roots*, which traced his ancestors back to the slave trading island of Goree just off the coast of Dakar, Americans have gradually been entering the tourist scene.

Though tourism in Senegal largely has been dominated by French hotel and resort chains, the country's idyllic climate and rich cultural setting, as well as Dakar's attractive city nightlife, have combined with the burgeoning strength of the dollar in recent years to make it a dynamic, untapped market for the American tourist industry.

Senegal's Direction de la Statistique conducted its first exhaustive national population census in 1976. Because of problems in data processing and cleaning, and delays in publication for this first full-scale statistical endeavor, 1976 census results were not released until 1982. In the meantime, planning for the next national census in 1986 began last June.

REGIONS AND CITIES

Senegal counted 5,068,741 citizens in April 1976, with a mean population density of about 25 inhabitants per square kilometer and a rural population density of 15 people per square kilometer. At an annual population growth rate of 2.6 percent in 1976, population was expected to double every 26 years. The U.S. Census Bureau has estimated an even higher growth rate of 3.2 percent per year for the pe-

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riod from 1980–1985 and a population increase of 654,000 between 1976 and 1985. *International Demographics* estimates the 1985 population at 6.5 million and the 1990 population at 7.4 million with a growth rate of 2.8 percent for the rest of this century.

With an estimated 1.7 million people or 27 percent of its population living in urban areas in 1985, Senegal has one of the highest urban growth rates in sub-Saharan Africa. Dakar, the country's capital, accounts for the largest percentage of urban growth. In 1981, an estimated 1.3 million people or 65 percent of those living in urban areas resided in Dakar.

Senegal's capital is increasing in population nearly three times faster than the country as a whole. The rural population, hard hit by drought and failed agricultural efforts, migrates to Dakar seeking better opportunities and services.

Because both family bonds and the concept of sharing are so important in Senegal, it is virtually impossible for those who earn decent salaries to turn away long lines of extended kin who appear at mealtimes or arrive for visits and stay for months at a time. And because the act of charity is considered a religious duty among Senegal's predominantly Moslem population, Dakar, an Islamic center and home of the country's wealthiest Senegalese and expatriate communities, is an attractive haven for beggars.

After Dakar, the next three most populous cities were Thiès, with an estimated 126,000 inhabitants in 1979; Kaolack, with 115,000 residents; and Saint-Louis, with 88,000.

For administrative purposes, Senegal is divided into 8 regions, 27 departments, and 97 arrondissements. Each region is headed by a governor appointed by and responsible to the president. The most densely populated region in 1976 was Cap Vert, the nation's industrial center and home of the capital, with 1,711 residents per square kilometer. Three regions in the groundnut basin are fairly densely populated: Thiès, with 102 people per square kilometer; Diourbel, with 97; and the Sin Saloum, with 42.

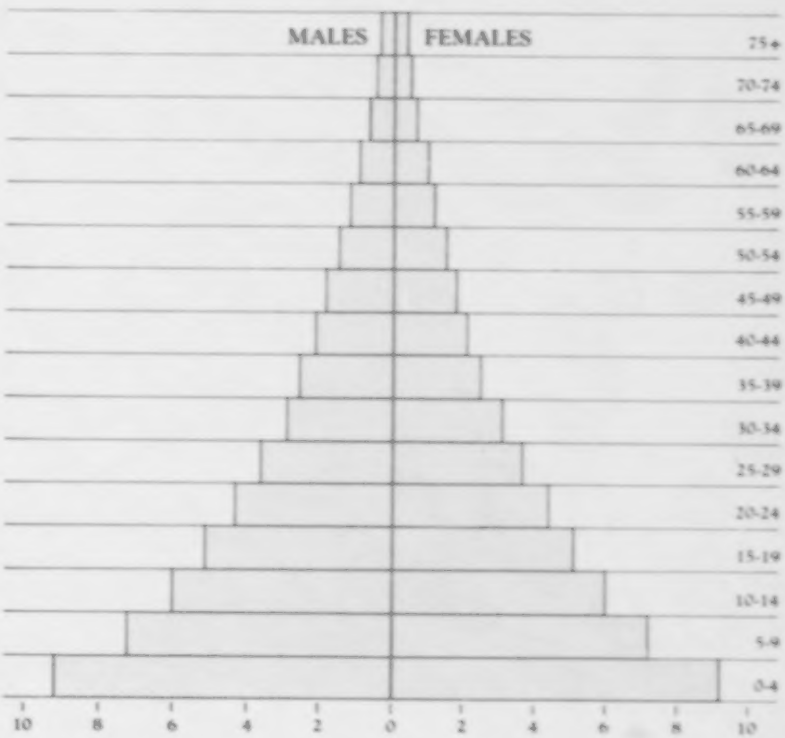
Senegal's four other regions house only 39 percent of the nation's population, although they cover 82 percent of its territory. Ironically, the regions with the greatest potential for irrigation and soil science research—the Casamance, Senegal Orientale, and Fleuve regions—have the lowest population densities, while those with the most exploited soil and unstable water sources are the most heavily populated.

HOUSING AND TRANSPORTATION

Though population density in Senegal's cities is on the rise, 73 percent of the population still lives in a rural setting. In 1977, only 18 percent of the population had access to electricity and in 1983, only

POPULATION OF SENEGAL BY AGE AND SEX: 1985

(in percent)



age	total	males	females
All ages	6,474,100	3,204,700	3,269,400
0– 4	1,193,300	597,200	596,000
5– 9	935,600	466,800	468,800
10–14	779,200	388,300	390,900
15–19	659,900	328,300	331,600
20–24	560,600	278,000	282,600
25–29	469,800	231,400	238,400
30–34	389,400	190,800	198,600
35–39	325,800	162,800	163,000
40–44	275,500	137,000	138,500
45–49	231,900	114,500	117,300
50–54	191,400	93,400	98,000
55–59	154,200	74,500	79,800
60–64	119,500	56,800	62,800
65–69	86,300	40,000	46,300
70–74	56,000	25,300	30,700
75+	45,700	19,600	26,100

Source: International Demographics, 1984

37 percent of occupied dwellings had access to piped water.

Rural villages are made up of clusters of huts built from clay, fibrous plants, or rough timber with thatched roofs and packed earth floors. Village chiefs and well-to-do villagers may build more permanent structures with walls of sun-dried mud bricks, stone, or cement, with roofs of corrugated iron.

A cluster of dwellings and storage sheds belonging to one family group is usually built around a central courtyard, with the entire complex screened by reed fences.

The male head of the family group in the compound usually has a house or room for himself and his older sons. In polygamous households, each wife has separate quarters, which she shares with her younger children. Married couples, unmarried young men, older women, and servants have their own rooms or areas, but a young single woman is not permitted to live apart from other family members.

In Senegal's urban neighborhoods, especially in Dakar, housing styles vary according to economic status. Government officials, wealthy businessmen, professionals, and expatriates live primarily in European-style houses or apartments on planned streets well served by electricity, where each home has piped water, telephone service, and garbage pick-up.

In central Dakar and other towns, middle-income Senegalese are served by some amenities, but open sewers and erratic electrical service are common in many neighborhoods. The poorest sector of the urban population lives in shantytown areas of huts and improvised shelters crowded along narrow streets and dead- end lanes. In these areas, water must be carried by hand from public fountains and lighting, if any, is provided by candles or kerosene lanterns.

Public transportation by taxi, bus, or *car rapide*—vans or station wagons for hire in cities—is readily accessible and relatively inexpensive in Dakar, though everything but taxis can be crowded, hot, and hazardous during rush hours.

Dakar is served by a fully equipped and developed international port that handles much transit traffic as well as more than 90 percent of the country's foreign trade. There are three other ports in the country at Saint-Louis, Kaolack, and Ziguinchor. The Dakar-Yoff International Airport is an important stop for international flights between Europe and South America and the major stopping point for flight traffic to most points in western and southern Africa.

Though rural feeder roads are poor, Senegal's main road network is one of the best in West Africa, boasting 1,686 miles of asphalt roads and 6,944 miles of laterite and dirt roads. A 640-mile railroad network handles most freight traffic, including trade from abroad to neighboring Mali and Mauritania.

AGE DISTRIBUTION

From dawn to dusk, children's playful cries ring out in Senegal's urban neighborhoods and its rural villages. When a Western visitor approaches, scores of children break out in fits of giggles and cries of *toubab* (white person), pleading good-naturedly for a ride in a car or a few coins. If they lack the sophisticated toys and games found in Western countries, they are seldom short of playmates.

Children reign in Senegal, where the single largest concentration of the population by age—14.2 percent—is 5 to 9 years old. Throughout sub-Saharan Africa, a combination of high fertility rates and low life expectancy have weighted the population balance in favor of the young. Senegal is no exception. More than half the total population is under age 18 and less than 3 percent is over 65 years old, according to our estimates.

Fertility is likely to remain high in Senegal as long as cultural and religious mores continue to assign a high value to early marriage and childbearing for women and to look askance at any form of birth control other than abstinence or planned periods of separation.

TIPS ON TRENDS

ENGLISH COUPLES MOVE TO SHARING TASKS

Shopping is shared by 44 percent of British married couples, but among couples aged 18 to 24, well over half—56 percent—share that chore.

If the trend continues among young marrieds, it could eventually shift British household buying patterns to be more like those in the United States where men and teenagers are becoming more involved in grocery and other household shopping. The trend is not likely to be quite as strong as in the United States, however, because married women with children are less likely to work in Britain than in the U.S.

A recent survey of British married couples found that of all those surveyed, 17 percent shared equally in preparation of the evening meal; 24 percent shared household cleaning equally; 44 percent shared equally in household shopping; and 10 percent shared equally in washing and ironing.

Among married couples between the ages of 18 and 24, 21 percent shared equally in evening meal preparation; 24 percent in cleaning; 56 percent in shopping; and 22 percent in washing and ironing.

If young unmarried women have their way when they are married, the sharing will become much more evident. Unmarried women between the ages of 18 and 24 in the following percentages said the tasks should be shared equally: 60 percent, evening meal; 61 percent, cleaning; 79 percent, shopping; and 40 percent washing and ironing. •

Source: British Social Attitudes: The 1984 Report, *Social and Community Planning Research.*

Marriage is by far the preferred state for women in Senegal. Data from the 1978 World Fertility Survey show that 87 percent of the women aged 15 to 49 had married at some point in their lives, and 83 percent were still married.

A Senegalese couple that had decided to limit their family to two children talked about their decision at a cocktail party held at the home of an American diplomat one evening. Though their conviction remained firm, their choice had added a huge burden to their lives. They could not visit relatives or even friends without attempts to cajole or pressure them into having children. "The pressure is unbelievable," the woman said. "The attitude is that if you are healthy and capable of producing more children and you decide not to, you must be incredibly selfish."

This scenario illuminates traditional attitudes regarding childbearing. Children are viewed as a gift of God, to be desired in as great a number as possible; it is not only a blessing but a duty to share your lot with as many as you are granted. Children are important as a source of agricultural labor and as a form of social security for aging parents.

For these reasons, the question of preferred family size was a delicate one in the World Fertility Survey. Twenty-nine percent of respondents gave responses such as "It depends on God," or, "It depends on my husband." Of those women who did respond with a number, 53 percent declared an ideal of nine or more children.

As in most developing countries, the potential for rapid population growth has been checked somewhat by high mortality rates affecting all age groups.

The mortality rate for the entire population was estimated at 20 to 22 deaths per 1,000 persons in the early 1970s, but the U.S. Census Bureau estimated a downturn in those figures to between 17 and 19 per 1,000 in 1984. Senegal's Direction de la Statistique projected an increase in average life expectancy from 45 to 47 years for women and from 43 to 46 years for men between 1976 and 1991.

TIPS ON TRADE

PRIVATE TV NOW IN WEST GERMANY

As of January 1, private television was available for the first time in West Germany, reaching about 120,000 households served by cable. Proponents of SAT-1, the new network, expect that it will increase program variety and will reach 1 million households by the end of this year. The new network makes about 12 hours of programming available, supported by advertising.

COFFEE MORE POPULAR THAN BEER

Beer is still the most popular alcoholic beverage in West Germany, with consumption averaging about 123 quarts a year per person. But coffee has taken over in popularity among all beverages. The average German drinks 140 quarts annually. In addition, the demand for nonalcoholic beverages is rising. Soft drinks and fruit juices account for 120 of the overall 533 quarts of commercial liquids quaffed annually per person in the country. The next most popular among nonalcoholic drinks is mineral water, selling just over 40 quarts per person per year.

Source: The Week in Germany, *German Information Center.*

ARGENTINA IS A CASH ECONOMY

Credit cards are being taken out of circulation in Argentina because of the 600 percent inflation rate, according to our Latin American correspondent, Ralph Hakkert. Shoppers in Argentina rarely use personal checks, partly because a personal checking account is hard to establish. Therefore, payments are made in cash. Inflation has encouraged consumers to apply their monthly incomes on the capital market, buy their daily necessities with a credit card and pay only at the end of the month when inflation has already taken some 15 to 20 percent from the money's value. In local slang, the operation has become known as the *bicicleta.*

HONG KONG BANK SEEKS CONSUMERS

Hongkong and Shanghai Banking Corp.—Hong Kong's largest financial institution—is aggressively pursuing personal banking customers following a period when it was difficult for the average salaried worker to obtain a loan. The *Asian Wall Street Journal Weekly* (Jan. 21, 1985) reports that Hongkong Bank is making it easier for consumers to obtain personal loans, overdraft privileges, and electronic teller cards. •

POLYGAMY

When asked by a Western visitor to explain why men are permitted to have many spouses while women are restricted to one, a Senegalese man looked genuinely surprised. "Why, a tree bears many fruit, but a fruit belongs to but one tree," he explained.

The relatively common practice of polygamy in Senegal adds another dimension to statistics on marital status. Long practiced among all ethnic groups, polygamy may even be on the upswing, according to World Fertility Survey data that show 32 percent of all married men were polygamous in 1978 compared with 28 percent reported in the nation's 1970–71 national demographic survey. The average number of wives per married man also increased slightly during that period, from 1.3 to 1.5.

In 1978, 48 percent of all married women between the ages of 15 and 49 lived in a polygamous union. Women under age 30 living in urban areas in the western or northeastern parts of the country were less affected by polygamy; among ethnic groups, the lowest incidence of polygamy was found among the

POPULATION DISTRIBUTION FOR RESIDENT POPULATION OF SENEGAL BY SEX AND LEVEL OF INSTRUCTION

type of instruction	*males*	*percent*	*females*	*percent*	*both sexes*	*percent*
Koran school	720,922	37.0	396,880	20.0	1,117,802	28.6
Arabic school	52,731	3.0	40,587	2.0	93,318	2.4
Primary school	357,243	19.0	232,538	12.0	589,781	15.1
Secondary school	109,998	6.0	52,480	3.0	162,478	4.1
High school	8,051	0.4	2,157	—	10,208	0.3
Professional school	10,719	0.6	5,303	—	16,022	0.4
Vocational school	184	—	212	—	396	—
Illiterate	668,183	35.0	1,252,249	63.0	1,920,432	49.1
Total	1,928,031	100.0	1,982,406	100.0	3,910,437	100.0

Source: Direction de la statistique, Dakar, 1982

Diola, Serer, and Peul women, with 51 percent of those married and over age 30 living in polygamous unions as opposed to 70 percent of Wolof women and 75 percent of Manding women.

Though polygamy shows no signs of abating in Senegal, laws governing its practice have been tightened in recent years as a budding women's movement in Senegal has gained momentum. Legislation now requires a man to sign a contract with his first bride informing her if he plans to take other wives so she can decide if she wishes to go through with the marriage on that basis. Islamic tradition and cultural pressures still hold sway over legal statutes in most rural areas, however, leaving a woman whose husband violates that contract with little practical recourse.

Another common marital practice in Senegal is the custom of men taking their male kin's widows as wives. In 1976, nearly a quarter of all married women between the ages of 15 and 19 were "inherited widows," and by age 60 more than a third fit that category.

EDUCATION AND COMMUNICATION

Although close to 80 percent of the population were counted as illiterate in 1976, opinion surveys at both urban and rural levels show education and intellectualism are highly valued in Senegal. Many of those thwarted from attending modern French schools for lack of teachers or schools or because of family obligations receive some instruction in more informal Koranic or Arabic schools. In the rural areas, it is not unusual to see groups of children assembled outdoors with their tablets, reciting Islamic prayers in unison.

There is a wide disparity between men's and women's literacy rates, with 28 percent of the male population literate in French or Arabic compared with 17 percent of the females. For many years, Islamic prohibitions on the integration of the sexes served to restrict women from entering schools, but the proportion of women attending school has increased significantly since independence, with the number enrolled in higher education in 1980 up to 20 percent.

International Demographics estimates that there are 12,600 readers of materials written in English in Senegal.

Extremely astute on domestic as well as foreign affairs, the Senegalese rely on two government-owned radio stations, a daily newspaper, and word of mouth for their news. Radio is the most effective element of the mass media, especially in rural areas marked by low literacy and unreliable distribution of the printed word.

The national broadcasting system includes two radio stations: Radio Inter, aimed at an urban intellectual audience fluent in French, and Radio Senegal, aimed at the masses and known for its broadcasts in Wolof, Serer, Sarakolé, Manding, Diola, and Pulaar.

A government-owned television station also operates in Dakar with local, French, and some English broadcasting, but only 11 percent of the population owned a television in 1980.

Le Soleil, Senegal's only daily newspaper, has established a reputation as one of the highest quality newspapers in West Africa with the lowest degree of government interference or overt censorship despite a healthy government subsidy.

LANGUAGE, ETHNICITY, AND RELIGION

Though French is Senegal's official language and governs business, commerce, and the mass media, only about 15 percent of the population speak or write French. The most widely understood language in Senegal is Wolof, a tribal dialect understood by 80 percent of the population. Other important indigenous languages of the country are Serer, Pulaar, Diola, Manding, and Sarakolé.

Representing 43 percent of the population, the Wolof tribe is Senegal's dominant ethnic group, followed by the Serer, accounting for 15 percent, the Peul, 13 percent, and the Tukouleur, 11 percent. Ethnic relations generally are harmonious and free of strife.

Senegal is home to a relatively large proportion of people from other countries. According to the 1976 census, there were 118,782 non-Senegalese in the country, though officials feel a substantial number more failed to divulge their true national ties to census takers.

Though some French remain in the Senegalese administration in an advisory capacity, their numbers and influence have declined sharply since independence and those still in the country serve mainly as foreign assistance technicians, teachers, and business entrepreneurs. Relations between the Senegalese and the French are amicable though distant for the most part.

For more than half a century, the Lebanese in Senegal have been the small-scale commercial middlemen between Africans and the world economy. In Dakar and other large towns, the Lebanese are most visible as merchants of European fabrics in the scores of fabric stalls that line the downtown market area.

Mauritanians, who make up 9.5 percent of non-Senegalese residents, also have established a prof-

itable niche for themselves as vendors in popular neighborhood variety shops known as *nar* shops and as fine artisans of hand-crafted silver and ebony jewelry sported in abundance by Senegalese and favored by tourists.

Islam is the professed religion of more than 80 percent of the Senegalese, including nearly all the Wolof. Another 6 percent are Christians, a group heavily represented among the educated elite.

Although the constitution guarantees freedom of religion and provides for separation of church and government, significant political power is wielded by religious leaders called *marabouts* who represent various Moslem brotherhoods. An extremely influential voice in government circles, marabouts play a leading role in shaping public opinion, mobilizing political support and controlling the economy and large portions of land, particularly in groundnut-producing areas. Their followers frequently seek them out for practical counsel as well as spiritual guidance.

Religion plays an important part in the daily lives of most Senegalese, and adherence to religious tradition is strict and full of ceremony. Moslem rituals such as praying five times a day facing East, fasting from sunrise to sundown for the 30 days of Ramadan and slaughtering a ram for the feast of Tabaski are observed rigorously.

LABOR FORCE AND INCOME

By far the largest proportion of Senegal's active male population—69 percent of 1.4 million—are employed in the agricultural sector, which includes farming, fishing, livestock, and hunting. Laborers and machine operators account for 14 percent of the active population, while business persons and vendors constitute 4 percent.

About 200,000 people were employed in the modern sector in 1976, most of these concentrated in the Cap Vert region, which claimed 85 percent of all salaries earned in the private sector, 63 percent of those earned in government-owned factories and 46 percent of the pay earned by public servants.

There were an estimated 888,000 women workers active in the labor force in 1980, with the highest proportion employed as domestic servants.

CONSUMPTION

Because Senegal's economy is so poor and its people so generous in sharing what they do earn, there is little room for conspicuous consumption in Senegal. In 1984, *Euromonitor* reported 4 percent of all Senegalese households had cars, 13 percent had a telephone, and 11 percent had a television. These figures may represent ownership in Dakar rather than other areas. The Senegalese do place a high value on both news and popular music—both Western and African—and 46 percent of the population reportedly owned radios in 1984. Stereo equipment and tape decks are common not only in urban areas but even in rural dwellings as long as there is a source of power.

BOTH MEN AND WOMEN TAKE PRIDE IN COLORFUL, ATTRACTIVE CUSTOM-MADE CLOTHING.

Both men and women take pride in colorful and attractive clothing custom-made by highly skilled but inexpensive tailors using locally-produced cotton batik and tie-dyed cloth or imported synthetic fabrics from abroad. In the rural areas, women wear long, brightly colored dresses or wrap skirts and turbans, and men wear long robes or loosely-fitting pants and tunics of batik or white cotton; in urban areas both sexes dress in a blend of traditional and Western style clothing.

The Senegalese diet consists largely of rice or millet, fish, vegetables, some beef and chicken, and various spicy sauces, most made with a peanut or tomato base and laced with hot peppers. The national dish, *cheb-bu-jen*, is a hearty rice, fish, and vegetable stew coated with a spicy tomato sauce and eaten religiously at noontime by many Senegalese.

Because Senegal's Moslem population is so large, consumption of alcohol is low although the region produces some excellent beers quite popular among non-Moslems and expatriates, as are the country's imported fine French wines. Soft drinks of all brands and flavors are extremely popular among the Senegalese, as are fruit juices, particularly pineapple and orange.

Open-air markets vending vegetables, grains and spices, fish, and meats serve the local population, while smaller enclosed markets and a few large supermarkets in the urban areas stock imported and packaged products consumed mainly by expatriates and wealthier Senegalese.

SOURCES

The U.S. Census Bureau's International Statistical Programs Center has published reports from Senegal's 1976 census, which also may be available at selected libraries. To arrange for photocopied excerpts of tables or for more information on the Senegalese census, write Peter Johnson, International Statistical Programs Center, U.S. Department of Commerce, Bureau of the Census, Washington, DC 20233, or call (703) 763-4086.

The International Trade Administration has published an updated Investment Climate Statement, Foreign Economic Trends Report, Overseas Business Report, and Updated 1984 Trade Statistics on Senegal, as well as a report on the food processing and packaging industry and an agricultural equipment marketing study for Senegal. It also has published trade regulations for Senegal from Dun and Bradstreet's *Exporters Encyclopedia*. Single copies of these items can be obtained from Renée Hancher, U.S. Department of Commerce, International Trade Administration, Office of African Affairs, Room 3317, 14th and Constitution

Avenues, N.W., Washington, DC 20230, telephone (202) 377-4388.

The Department of State's *Background Note Series* includes a June 1984 summary for Senegal (#7820). Single copies are available from the U.S. Department of State, Bureau of Public Affairs, Office of Public Communication, Washington, DC 20525.

The *Area Handbook Series* of the Foreign Area Studies Program at the American University (Washington, D.C.) published a country study of Senegal in 1974. This 351-page volume summarizing the history, social and economic climate and government and politics of Senegal can be ordered from the U.S. Government Printing Office for $11. The stock number is 008-020-00521-5.

An English language summary of 1978 World Fertility findings from Senegal or the country report itself—*"Enquête sénégalaise sur la fécondité 1978"*—may be ordered from the International Statistical Institute, 428 Prinses Beatrixlaan, P.O. Box 950, 2270 AZ, Voorburg, The Netherlands.

A U.S. Census Bureau report, *Women of the World: Sub-Saharan Africa*, contains comparative data on population, literacy, labor force, marital status, fertility and mortality on women in sub-Saharan Africa. This 200-page report, published in August 1984, can be ordered for $5.50 from the Data User Services Division, Customer Services (Publications), Bureau of the Census, Washington, DC 20233.

As part of its *Population Bulletin* series, the Population Reference Bureau has a report on "Sub-Saharan Africa: Population Pressures on Development," by Thomas Goliber, Volume 40, No. 1, February 1985. It is available for $4 plus a $1 handling fee from the Population Reference Bureau, 2213 M St., N.W., Washington, DC 20037, telephone (202) 785-4664. •

—Deborah Gold

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FEATURE

CACI MARKET ANALYSIS DIVISION

Although part of the same family, CACI's London-based Market Analysis Division is not an identical twin of its United States' sister.

Some of the differences result from CACI's relationship with the British Office of Population Surveys and Censuses, some from the retailing and direct mail environments in England, and others from the way census data are used by consumer goods companies when the geography being considered is less expansive than that in the United States.

First, the British census office doesn't sell summary tape files outright in the same way that the U.S. Census Bureau does. Instead, the Crown Copyright requires that CACI or any other firm that chooses to buy, process, and resell the data pay a royalty every time the data are sold. As a result of the expense involved, there has been no proliferation of private data processing companies the way there has been in the United States. In addition, the British Office of Population Surveys and Censuses is efficient in supplying small area statistics to businesses, so there has been no market for private companies to do so.

The retailing environment is also quite different in Britain. A retailer in any community can get to any other community in a day or less by train. Most British people know a lot about any town of reasonable size in their country and retailers are well acquainted with the retail atmosphere in the "upmarket" towns of Britain. As a result, retailers don't need to purchase the demographic characteristics of markets for the same kinds of analysis that are needed in the United States where few people can be acquainted with the retail atmosphere in more than 3,000 counties.

The net result is that CACI in London carries a different product portfolio than CACI in Washington, according to Richard Webber, vice president in charge of the London office.

The SITE product, which provides the demographics of small areas to assist in site selection, is carried only through time-sharing.

ACORN (A Classification of Residential Neighborhoods), which clusters Britain's neighborhoods by income and lifestyle into 38 distinct groups, is used in the same way the U.S. ACORN system is used—to target locations and addresses of customers who are most likely to buy different kinds of products.*

A new product called "ACORN Motoring" uses data from the 1981 census and a Motorists Panel operated by RBL Forecast, a market researcher in the automotive field. The reports produced from "ACORN Motoring" give detailed consumer expenditure reports on a street-by-street, product-by-product basis anywhere in Britain, enabling garage owners, oil companies, and car accessory manufacturers to pinpoint the most effective areas to market their products.

Rather than simply selling off-the-rack products, CACI's London office prefers a "consultancy" approach, Webber says. And as is the case with "ACORN Motoring," it frequently creates a product in a joint venture with some other company.

"We have found that there is a new and distinct consultancy profession—not just a fragment of marketing—developing. The proper use and understanding of demographics is seen as so complex that it requires specialist consultants in the area," Webber said.

For example, Webber notes that in every country there are marked regional differences in products

* *For a more extensive discussion of the way cluster systems work in general, see the November 1982 issue of* American Demographics.

that are purchased. "You can often get misleading results if you can't define the base area from which you are working," he explains.

He uses as an example the sales of expensive German imported cars in the United States, which are highest on the East and West Coasts. If you just pick ACORN types according to the sales of those cars and assume that sales will be duplicated in that same ACORN type no matter what its geographic location, you would be wrong, Webber says. "It is sometimes hard to select the right geographic base," he explains, "which is why we feel it is difficult to sell these products without consulting extensively with the client."

Eighty to 90 percent of CACI's British revenues come from the use of their products for direct mail applications, Webber says.

The British list rental market is largely undeveloped. There is a great deal more concern in that country about privacy, and because national distribution systems are so good, people rarely subscribe to magazines. Instead, they buy them on the newsstand, so the large magazine-subscriber lists that are rented in this country are simply not available in Britain.

A company that creates new magazines in Britain uses ACORN to decide what groups will respond to specialized magazines and then targets its mailings to those different groups with the use of the ACORN-based address system. The ACORN system helps them assure advertisers that their messages will reach their targets. The first two magazines were a gardening magazine directed to first-time owner occupants of houses and a personal finance magazine designed for empty-nesters over age 50.

Even the British post office promotes ACORN as a means of segmenting the market better. The post office has an "unaddressed" mail system available, but to help companies target their mailings more efficiently, it encourages the use of ACORN as a "consumer location system."

The largest catalog company in Britain, Great Universal Stores, created an address base from the voters' rolls, and has used ACORN to take that address base a step further by linking the addresses with the ACORN types of CACI.

The system is also favored by companies that distribute leaflets—a much larger business in Britain than in the United States. And, unlike in the United States where credit scoring is such a controversial issue that it is rarely discussed, in Britain credit-scoring companies use ACORN types to help them decide whether to offer credit. "The use of ACORN is legal for that purpose in Britain," Webber says, "as long as ACORN isn't the only criterion that is used."

WORKFORCE DATA

CACI's newest product is WORKFORCE, a product that targets consumers by where they work and helps locate business-to-business opportunities. ACORN comes into play by typing areas according to the ACORN-types who work there rather than those who live there.

The data were compiled from a 10 percent sample of the 1981 census in which people were asked to give the exact address of their workplace.

Besides helping retailers decide whether a location is a good one for daytime sales, it also provides data on the retail composition of towns. "It can scan the country, for example, to find places where there aren't as many jewelers per capita as could be successful. If everyone uses the same demographic information to locate in the same places, not all of them will be successful."

Besides working in Britain, CACI last month launched an ACORN system in Sweden (see sidebar) and it plans to have Irish and West German systems in place by the middle of 1986. Webber says CACI would like to do more work in France, but that it is difficult to match addresses to census areas in that country.

CACI Market Analysis Division in the United States can be reached by writing 1815 North Fort Myer Drive, Arlington, VA 22209 or by calling (703) 841-2356. In Britain, CACI is located at 59/62 High Holborn, London WC2, England; telephone 404-0834. The contact in Britain is Richard Webber; in the U. S., Dan Huck, vice president and director of the U.S. marketing analysis division. •

INSIDE INFORMATION

NEW SWEDISH ACORN SYSTEM AVAILABLE

CACI's ACORN system in Sweden was launched with agreements between CACI, the leading leaflet distributors Svensk Direkt Reklam, and Testologen, a market research bureau.

Based on demographic statistics for each of Sweden's 4,700 post number areas, the ACORN system defines 28 distinct types of residential neighborhoods. These range from smart nonfamily flats in city centers through modern rented housing for families on the urban fringe to different types of agricultural communities and rural service centers.

Testologen has classified respondents to its market research surveys according to the ACORN code of their address post number, thereby making it possible to establish the ACORN types, and hence the best post numbers, for finding users of particular media, products, financial services, or leisure pursuits.

Where customer addresses already exist, these can be analyzed by post number to show which ACORN types are the most frequent purchasers of the product or service in question.

Having used ACORN to define the target market, advertisers can then use Svensk Direkt Reklam (SDR), which has matched its leaflet distribution zones to the post number system and is offering distributions targeted to the ACORN types shown by the Testologen surveys to have the highest customer potential for particular types of products.

REGIONS

AFRICA

GROWTH IN BOTSWANA

The fastest growing urban census districts in Botswana between 1971 and 1981 were Gaborone, Selebi-Phikwe, and Orapa.

Gaborone grew 237 percent, to a total population of 59,657, making it Botswana's largest city. Next in size is Francistown, with 31,000 residents, but it grew only 67 percent in the ten-year period.

Selebi-Phikwe reached a total population of 29,400, with growth of fully 497 percent. Although Orapa grew by 332 percent, its total population in 1981 reached only 5,229 people.

The largest census district in Botswana is the Central area, with 323,328 people in 1981.

BLACK CONSUMERS AND THEIR BUYING POWER

This year the total buying power of South African whites is expected to be 40 percent, while that of blacks will be 47 percent, according to a professor of business economics at the University of Potchefstroom.

In an article in *Woord en Daad*, Prof. G. J. de Klerk said blacks will make 60 percent of food purchases. Whites will account for only 25 percent of food purchases; coloreds, 11 percent; and Indians, 4 percent.

Blacks will be second to whites, de Klerk projects, only in purchases of liquor and cars.

And, says the managing director of a firm called Consumer Behavior, the black consumer of the future will not accept inferior merchandise. Eric Mfuna told the Caterers Association at Rands Afrikaans University that the modern black consumer is changing in diet as well as in buying habits.

Retailers in black areas need to provide facilities for frozen foods, for example, if they expect that frozen and prepackaged foods will penetrate black areas to the extent they have white areas.

Source: South African Digest, *published by the Publications Division of the Department of Foreign Affairs, Pretoria, South Africa. Reports above are excerpted from* Die Vaderland *and* Business Times.

ASIA

TOKYO'S AGED

Metropolitan Tokyo now has nearly 1 million people aged 65 and older, according to a report called "Number of Households and Population in Tokyo Based on the Master Resident Register."

The total population reached an all-time high this year of about 11.5 million, up by 64,600 from 1983.

The juvenile population (aged 0 to 14) increased to 2.2 million, the working age population (aged 15 to 64) to 8.3 million and those over age 65 to 992,555. Nearly 9 percent of the Metropolitan Tokyo population is now over age 65, compared with about 13.5 percent of the Japanese population in general. Household size continues to decrease slightly in Tokyo while the number of households increased by 1.5 percent between 1983 and 1984.

Despite the fact that Tokyo is a large urban area, more than 50 percent of its families raise at least some of their own vegetables, according to a survey done by the Tokyo Municipal Government's Bureau of Citizens and Cultural Affairs. Young people in their 20s showed a particular interest in raising vegetables and of those who said they don't raise them now, 76 percent expressed an interest in doing so in the future.

Such a finding could mean a market for urban gardening products such as window garden shelves, herb gardens in pots, fluorescent lights for plants, plant foods and other items which allow gardening in a tiny space.

While 44 percent of those polled said they spend only about 5,000 yen a year (about $20) on plants and flowers, another 41 percent said they spend at least twice that amount.

News of Tokyo is reported quarterly in the *Tokyo Municipal News*, available from The Liaison and Protocol Section, International Communication Division, Bureau of Citizens and Cultural Affairs, Tokyo Municipal Government, 5-1 Marunouchi 3-chrome, Chivoda-ku, Tokyo, Japan.

SOUTH KOREA

South Korea's official attitudes toward family planning have evolved slowly.

In 1961, its family planning slogan was "Have few children and bring them up well."

By 1971 it had changed to "Stop at two regardless of sex."

And, the most recent slogan — a tribute to the rising status of women in Korea — is "A well-bred girl surpasses ten boys."

Writing in *Korea's Economy*, a publication of the Korea Economic Institute of America, Inc., Glenn Lehmann reports that the direct effect of rising incomes on birth reports is not known.

But, "an analysis of the 1974 Korean National Fertility Survey points to two probable indirect effects. Higher income households wanted more education for their children, but given the importance of private post-primary schools in Korea, the costs of additional education rose faster than incomes, reducing desired family size. Also, parents' dependence on children for old-age support generally decreased as income rose, lessening the incentive to have large families. The even more rapid growth of savings, pensions, and insurance policies further decreased parents' need to depend on their children in old age."

Between 1960 and 1980, population doubled, urban population nearly doubled, and secondary school enrollment increased 2.5 times. At the same time the population growth rate went from 3 percent a year to 1.6 percent a year. South Korea's government hopes to achieve replacement level fertility by 1988.

The report (July, 1984; Vol. 3, No. 6) is available from Korea Economic Institute of America, Inc., 1800 M St., N.W., Suite 225, Washington, D.C. 20036.

ASIANS FIND WORK IN THE MIDEAST

Many Asian workers are still dependent on finding work in the Mideast in order to support their families at home.

Because these workers remit a significant portion of their wages to their families in their home countries they are an important source of consumer revenue in those countries.

Data reported at an Expert Group Meeting on International Migration in Asia and the Pacific in Manila indicated that in 1983, 930,000 workers from India were in the Middle East. Indian companies reportedly have contracts for 500 projects in the Middle East worth a total of $750 million.

Indonesia only recently began to export labor. Fewer than 10,000 people a year worked overseas between 1979 and 1981, but the government would like to see that number raised to about 80,000 workers a year.

A report on the Expert Group Meeting, printed in a recent issue of *Population Headlines* from ESCAP says, "The Republic of Korea has the most comprehensive program for supplying labor to the Middle East. Korean workers in the Middle East are permitted to work only for Korean companies and room and board is provided so that they are able to remit a high percentage of their earnings. In 1982, 196,855 Koreans went overseas to work—151,583 to the Middle East. Remittances from workers in the Middle East equalled $1.9 billion in 1982, or 8.9 percent of the value of exports of goods. In addition it is estimated that the value of Korean construction contracts in the Middle East totalled $30 billion by 1980."

It was estimated that 500,000 Philippine workers were in the Middle East in 1982 and that they remitted more than $700 million.

In 1983, about 1.2 percent of the Sri Lankan population was estimated to be working in the Middle East. In 1980 and 1981, the number of women among the Sri Lankan workers outnumbered the men because the women could get work as domestic servants.

In 1983, about 230,000 Thais in the Middle East returned about $1 billion to their country.

"The Expert Group Meeting concluded," the report says, "that the export of labor has been a net benefit to the Asian countries of the ESCAP region. Since their domestic labor forces are large, emigration has had little impact on them. At the same time, remittances earned from workers abroad as well as overseas contracts gained by Asian companies have been a major source of foreign exchange earnings."

HONG KONG

The small family concept has generally been accepted in Hong Kong. The 1982 Family Planning Knowledge, Attitude, and Practice Survey found that the actual number of children per family decreased from 3.7 in 1967 to 2.6 in 1982. The birth rate declined from 23 per 1,000 in 1967 to 16.5 per 1,000 in 1982.

CHINA

China has completed computer tabulation of its 1982 census five months ahead of schedule, according to the State Council Census Office. The final tabulations are close to those of the manual tabulations in International Demographics' China profile in October, 1984.

MIDDLE EAST

EGYPTIAN MIGRANTS

A small study reported in the Egyptian journal, *Population Studies*, reports on agricultural workers who left two Egyptian villages in 1983 to take jobs in other Arab countries.

While the authors are reluctant to generalize their findings to the condition of all agricultural workers who migrate from Egypt, their findings are worth reporting.

They found that the majority of migrating workers were between the ages of 21 and 35 and that economics were the primary reason for migration. Nearly half of them picked the country to which they migrated because a visa was not required.

Thirty-seven percent entered construction work, 18 percent services, 14 percent agricultural work, and 11 percent went to work in restaurants. About one-quarter said they had to accept work that did not suit them, but were later able to change jobs.

The migrant workers said they intended to use their savings for house construction, family needs, marriage costs, and investments.

But their actual expenditures were 29 percent on modern household equipment, 23 percent on repayment of loans, 16 percent on home construction, 11.5 percent on buying cattle, 11 percent on savings, and 6.6 percent on buying gold.

The full article in Arabic is found in Vol. 11, No. 68 of *Population Studies*, published by The Research Office of the Population and Family Planning Board, Cairo.

COMING UP

Profile: The demographics of London's neighborhoods suggest varying business opportunities.

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